

CAPABILITIES / TRUSTS & ESTATES

Fiduciary Litigation

When controversies involving estate planning or trust administration arise, we are committed to diligently protecting our clients' interests through creative solutions based both on our deep understanding of this highly-specialized area of the law and our outstanding courtroom skills.



OVERVIEW

"We are sensitive to the personal and important decisions our clients have to make in difficult, often emotional times, and provide steadfast guidance to each family's unique circumstances."

Our Value

Unforeseen circumstances can cause even the best laid plans to go awry and when the administration of an estate or trust does not proceed smoothly, we represent executors, trustees and beneficiaries in Pennsylvania and New Jersey—including in the New Jersey Surrogate's Court and Pennsylvania Orphans' Court—in a wide variety of actions. These representations include contested tax matters as well as the following:

- Interpretation and reformation of wills and trusts agreements and will contests
- Audits of gift, estate and inheritance tax returns and ontested audits
- Surcharge actions
- Petitions for designation or removal of executors and trustees
- Breaches of fiduciary duty; and,
- Removal and compensation of fiduciaries.

We also represent individuals in petitions for allowance of principal for guardianship matters, the appointment and removal of guardians, and filing of annual reports (for the guardian of the person or guardian of the estate), as well as guardian's accounts. In addition, our team handles appeals from

decisions of the Pennsylvania Department of Revenue and the assessment of Pennsylvania's inheritance tax. In addition to representing our clients in court, we represent parties in alternative dispute resolution proceedings, including arbitrations, mediations, and negotiated settlements.

Our Clients

Our clients include individual as well as corporate entities in their fiduciary roles which vary in name from state to state as agents, guardians, conservators, executors and trustees, as well as public and private charities and foundations, involved in a broad array of disputed matters. Our representation includes matters of disputed estate tax and administration issues, probate and trust administration conflicts, and disputes arising from all types of fiduciary relationships. We provide guidance in reaching a settlement or in the litigation of contested matters. We also provide assistance to fiduciaries in audits and valuation disputes arising during the administration of taxable estates.

Our Focus

In the event of a dispute, our focus is on obtaining the best possible result for our clients, whether maximizing benefit or minimizing liability, and our lawyers have achieved significant success in resolving disputes for our clients in state, federal, and tax courts. We are sensitive to family dynamics and the unique pressures faced by families working hard to protect family members and their assets and we understand the emotional turmoil such lawsuits create. As such, we work with and support our clients during the estate planning process to fortify their estate plan against attack and, if necessary, we stand and defend a client's intent.

Awards Won*





*[Click here](#) for a description of the standard or methodology on which the awards and honors are based. No aspect of this advertisement is approved by the Supreme Court of New Jersey.

ATTORNEYS

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